

# Handout for the SupplyOn Service Vendor Managed Inventory (VMI)



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# 1 About this Manual

The content of this manual shows you how to work with the Vendor Managed Inventory process.

### 1.1 Abbreviations

Abbreviation	Meaning
ASN	Advance Shipping Notice
CSV	Comma Separated Values
ERP	Enterprise-Resource-Planning
Мах	Maximal
Min	Minimal
VMI (IPR)	Vendor Managed Inventory (Inventory Projection)
WebEDI	Web based EDI
XLSX	Excel 2010



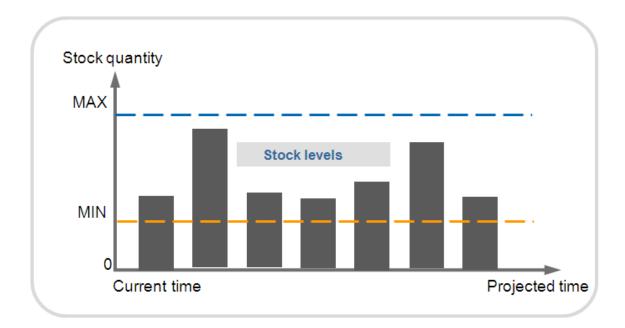
# 2 Introduction to the Vendor Managed Inventory process

The Vendor Managed Inventory (VMI) is an approach where you as a supplier are responsible for the management of the stock held by your customer.

The material assigned to the VMI (IPR) process does not appear as a demand in the purchase order overview.

Your customer will provide appropriate demand forecasts, their current inventories as well as minimum (Min) and maximum (Max) stock levels on a regular (usually daily) basis.

You should apply the correct replenishment actions in order to trigger appropriate deliveries of the requested material to your customer's warehouse and keep the material stock between this Min & Max levels.



### 2.1 Stocks levels

There are several stock types:

- Actual stock: the quantity of goods present at the current time
- Projected Stock: describes the evolution of the available stock in the future

As soon as the application detects irregular cases (e.g. an out-of-stock situation), an alert is raised.

Thanks to that, you may only need to react if an alert is raised. If there are no alerts raised by SupplyOn concerning a VMI material, there is no need for you to perform replenishment actions for this material.



The following types of alerts are available:

- ✓ If the inventory level is not between the agreed Min & Max
- ✓ If the inventory level is not between the agreed Min & Max at the end of the day
- ✓ If the inventory level is not between the agreed Min & Max in the future

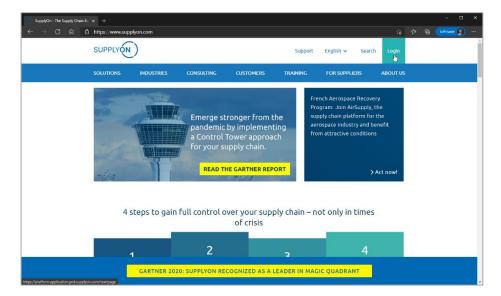
You need to set up the alerts by yourself as described <u>here</u>.



## 3 How to access SupplyOn

To work with SupplyOn your company administrator needs to set up an account and initial password for you. The administrator will assign the appropriate roles to you (see chapter 8, Roles and Rights).

Your customer sends demands and their stock levels from his ERP system(s) on a regular basis. Based on this information, you are enabled to manage your deliveries. There is no automatic email notification as you are used from other processes.



Open an internet-browser and log in to SupplyOn.

Figure: SupplyOn home page with Login button



Depending on your roles, you may see different tiles than used in the following screenshots.

1. Click the tile Logistics & Finance

SUPPLYON My SupplyOn Sup	plyOn Services 🔻 Administratio	n ▼ News		Log Out
	SupplyOn > Home			C Last Refresh 2 Mins Ago
	Action Management $ ightarrow$	AirSupply Logistics $ ightarrow$	Business Directory $ ightarrow$	Are you using the best browser?
	Share action plans with your customers.	Access the demand and delivery processes including E-Involcing,	Find the master data of your company.	Please use Google Chrome, Mozia Firefor or Microsoft Edge (Chrome-based versions since January 2020) for highest speed and functionality. More
E Horne	Open	concession and notification of escape for the aerospace industry.	Open	Congratulations - you have no urgent tasks
<ul> <li>Help &amp; Support</li> <li>Feedback</li> </ul>	Collaboration Folders $\rightarrow$	Document Management $\rightarrow$	Flexible Survey $\rightarrow$	
	Work on development projects with your customers.	Receive and review important documents from your customers.	Find and edit surveys from your customers.	
	Open	Open	Open	
	Logistics & Finance $\rightarrow$	Performance Monitor $\rightarrow$	Problem Solver $ ightarrow$	
<	Access the demand and delivery processes including E-Invoicing.	Find key figures on the product and delivery quality of your customers.	O Actions due within 24 hours O	

Figure: Home screen with tiles per application and actual  $\ensuremath{\mathsf{notifications}}$ 



### 4 How to work with the Dashboard

The Logistics & Finance Dashboard is displayed.

Depending on your roles, you may see different tiles than used in the following screenshots.

		SupplyOn > Logblics & Finance > Depiles	ard .					C Las Roboth 3 Mills A	∞ #
Logistics & Pinance		Search Select Process		* <u>Sec</u>	h e.g. für Order Bis, Maleri				
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Densed •		10 Total New Driver & Upsteine		0 Conset new Dalway instructions		O Current new Californiy Francesco		O Current mere JIT CaluDite	
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Invocing	×	Drate Cyclotes	•						
Fisher Tour									
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		Confirmable Orders	÷	Alerta	•	elivoising	>	Settings and Master Data	
		13 Tea Carlonasa Dears		124		34 Text Eliste term		Down- and Upload Settings -> Format -> Download Profiles	
		Order Status		Туре		Billable Item States	_	Master Data	
		Ented	•	Inventory Ainte		Drieble News Due	54	→ Org. Master Data → Performance Data	
		Party Continued	1	mozores	45				
		Oper	12	National Distance Alasta	٠				
		Confirm Onders		Denané Alete	71				

Figure: Dashboard

### 4.1 What I can see in the VMI (IPR) tile

Within the VMI (IPR) tile you see material-based alerts.

- Projected Stock: Inventory Alerts the sum of all alerts
- Actual Stock: Inventory Alerts the sum of alerts based on the Actual Stock status
- Material Situation at the end of today:
  - o Below Zero: the actual stock is below zero at the end of the day
  - Below Min Limit: the actual stock is below the agreed minimum level at the end of the day
  - Above Max Limit: the actual stock is above the agreed maximum level at the end of the day

VMI (IPR)		$\rightarrow$
11	9	
Projected Stock: Inventory Alerts	Actual Stock: Inventory Alerts	
Material Situation at th	ne end of today	
Below Zero		8
Below Zero		
Below Zero Below Min Limit		
		8

Figure: Dashboard / tile / VMI (IPR)



# 5 How to work with the Inventory Projection

### 5.1 How to open the Inventory Projection

1. To get an overview of all material numbers managed by VMI (IPR), click ->



Figure: Dashboard / tile / VMI (IPR)

In this example 18 different material numbers are flagged by your customer with VMI (IPR) and appear in the IPR Materials overview screen.

Backting         Kerkel         Status         Stock		~				Add line	e   Delete line						My Searc	h Profiles	<ul> <li>Hide Search Area</li> <li>Manage View</li> </ul>
Vitil Guide Verv         Manage Verv         Manage Verv         Manage Verv         Status         Stock         Stock         Demand L.         In-transL.         Mm.         Max         15 Stock Colt         First Selow Max*SL         Code Buye         Plant Buyer         Unboading P           45093         0         0         0         0         0         100021         100021         First Valow Max*SL         Code Buyer         Plant Buyer         Unboading P           1134098         0         271 900         0         0         100021         100021         1010         B. Fischer Max         B. Fischer Max <th>Search Res</th> <th>iet</th> <th></th> <th><ul> <li>Manage view</li> </ul></th>	Search Res	iet													<ul> <li>Manage view</li> </ul>
Material         Material         Status         Stock	PR Materials	RPM Materials													
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1114090         I         9 907 - 32758         38.285         6 000         4 500         7 300         160821         160821         ITTO         B Fischer Hala         Treentritai           205538         I         0         0 - 258         3.287         0         640921         160921         160921         ITTO         B Fischer Hala         N-UK Gabe           205538         I         0         -258         256         0         0         160921         160921         ITTO         B Fischer Hala         N-UK Gabe           ASX-000241         I         661         -258         3.300         0         100         800         160921         160921         ITTO         B Fischer Hala         N-UK Gabe           96555         I         0         0         0         0         16002         100821         ITTO         B Fischer Hala         D-EMO           96555         I         0         0         0         0         1000         5000         160921         160921         ITTO         B Fischer Hala         D-EMO           96555         I         0         0         0         0         1000         160921         160921         ITTO         B Fischer Hala	Material	Material Desc.	Status	Stock	Stock	Demand t	In-transi	Min.	Max.	1st Stock Out	First "Below Min." Sit.	First "Above Max" Sit.	Code Buyer	Plant Buyer	Unloading P
202539         Image: Second seco	456983		100	0	-271 900	271 900	0	0	0	16/08/21	16/08/21		MX01	B. Fischer Mexico	B. Fischer Me
NUC-GONDIT         Image: Constraint of the second state of the second sta	11348098		100	9 507	-22 758	38 265	6 000	4 500	7 300	16/08/21	16/08/21		IT01	B. Fischer Italia	Trennfurt - /
ASA-00004         I         Ge1         -2-519         3.30         0         100         800         160021         160021         160021         160021         160021         160021         160021         160021         1701         B. Fischer Halls         DEMO           885-50001         0         0         0         0         0         160021         160021         1701         B. Fischer Halls         DEMO         2000         160021	2025338		100	2 628	-659	3 287	0	800	1 600	16/08/21	16/08/21		IT01	B. Fischer Italia	Bekaer
ASA-00001         Fill         671 - 2423         3 300         0         200         600         1608/21         1008/21         1701         B Fischer Halle         DEMOLY           989555         4         452         24733         27190         0         0         0         1000         5000         1608/21         1701         B Fischer Halle         DEMOLY           989555         4         452         26733         271900         0         1000         5000         1608/21         1608/21         IKK01         B. Fischer Halle           98055         4         524         24533         271900         5600         5000         5000         1000         1608/21         1608/21         IKK01         B. Fischer Halle         B. Fischer Malle	NUK-000017	the second s	100	0	-250	250	0	0	0	16/08/21	16/08/21		IT01	B. Fischer Italia	N-UK Gate
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992745         900         3473         3 207         1416         1150         2700         6 000         1090827         11701         B Fischer Halla         B Fischer Hall	NUK-000010			0	2 000	54 000	56 000	2 000	5 000				IT01	B. Fischer Italia	N-UK Main Gat
345828         Sealing         III         7922         7922         0         0         7000         12000         2308/21         MX01         B. Fischer Mexico	456828		100	3 264	-244 536	247 800	0	3 000	10 000	16/08/21	16/08/21		MX01	B. Fischer Mexico	B. Fischer Me
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12242-B         Image: Constraint of the state of t	345828	Sealing		7 922	7 922	0	0	7 000	12 000		23/08/21		MX01	B. Fischer Mexico	B. Fischer Me
12275         IIII         2 625         2 217         1 176         7 68         6 10         1 565         26/09/21         1 700/21         I T01         B. Fischer Italia         B. Fischer Italia           346828         IIII         7 922         10 0022         0         2 100         950         5 000         -         1709/21         I T01         B. Fischer Italia	890128	Casing		2 570	6 272	1 098	4 800	1 000	2 000			17/08/21	IT01	B. Fischer Italia	B. Fischer Itali
MB2828         MB         7 922         10 022         0         2 100         950         5 000         17/08/21         ITO1         B. Fischer Italia         B. Fischer It	123442-B	the second se		9 200	1 788	11 212	3 800	1 000	3 400				DE01	B. Fischer DE	750
747490 🗰 2 242 1 299 943 0 500 3 000 23/08/21 21/08/21 1701 B. Fischer Italia B. Fischer Italia	127376			2 625	2 217	1 176	768	610	1 566	26/08/21	23/08/21	17/08/21	IT01	B. Fischer Italia	B. Fischer Italia
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NUK-000003 I 💷 1 000 -53 000 54 000 0 2 000 3 000 160821 160821 IT01 B. Fischer Italia N-UK Main Gat	747490	Contraction of the local distribution of the		2 242	1 299	943	0	500	3 000	23/08/21	21/08/21		IT01	B. Fischer Italia	B. Fischer Italia
	NUK-000003		1000	1 000	-53 000	54 000	0	2 000	3 000	16/08/21	16/08/21		IT01	B. Fischer Italia	N-UK Main Gat

The columns marked in green give you an actual overview of the stock situation per product.

The Status represents the following color codes:

- Red: Stock out
- Orange: below minimum
- Blue: over maximum
- ✓ Green: ok

The **Min** and **Max** columns show the limit levels defined by your customer, and the column **First** "**Below Min.**" Sit. shows when the stock is expected to get below the minimum.

- 2. Select the material you want to work with by setting a tick
- 3. And click Inventory Projection.

Figure: IPR Materials / Overview

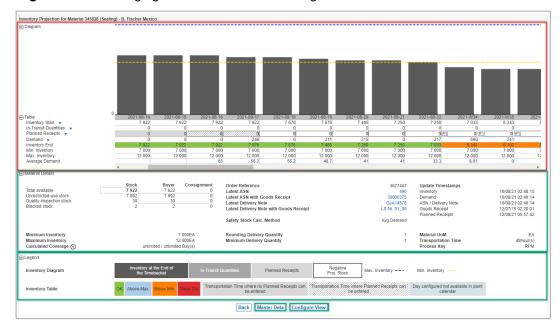


The Inventory Projection screen is divided into three areas:

- Diagram and table overview of actual and projected stock levels and their position related to the min & max range, demands and planned deliveries including a graphical visualization
- Material Details information like rounding and minimum delivery quantity, timestamps of last stock messages as well as order and ASN references
- Legend explains the color codes in the diagram

The following buttons help with:

 Master data – changing the selected material master data like for example rounding and minimum delivery quantity



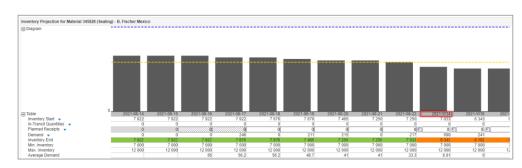
✓ **Configure view** – changing the actual view of the diagram

Figure: Inventory Projection with marked areas and buttons

### 5.2 How to plan your deliveries

The following screens and actions are examples to explain how to plan your deliveries.

The screenshot shows that the stock level slips below the agreed minimum quantity in calendar week 34. The minimum agreed quantity is represented by the yellow line. The maximum agreed quantity is represented by the blue line.





#### Figure: Inventory Projection diagram and table

The transportation time for this material to the customer location is defined with 48 hours. This is a setting you define in the master data as described <u>here</u>. This ensures that you cannot plan a delivery within this defined period. In the screen above the 16<sup>th</sup> and 17<sup>th</sup> August are blocked in the Planned Receipt line.

Material Details							
Total available Unrestricted-use stock Quality inspection stock Blocked stock	Stock 7 922 7 892 30 2	Buyer 7 922 7 892 30 2	Consignment 0 0 0 0	Order Reference Latest ASN Latest ASN with Goods Receipt Latest Delivery Note Latest Delivery Note with Goods Receipt Safety Stock Calc. Method	3627447 490 33000375 GJA14578 LS-Nr. 01_06 Avg Demand	Update Timestamps Inventory Demand ASN / Delivery Note Goods Receipt Planned Receipts	16/08/21 02:48:15 16/08/21 02:48:14 16/08/21 02:48:14 12/07/15 02:20:01 12/08/21 05:57:42
Minimum Inventory Maximum Inventory Calculated Coverage ()	unli		000EA 000EA Day(s)	Rounding Delivery Quantity Minimum Delivery Quantity	1	Material UoM Transportation Time Process Key	EA 48hour(s) RPM

Figure: Inventory Projection with material details and the defined transportation time

1. Enter into the **planned receipts** field for August 21st the quantity **1200.** 

As a result, you can see that there is no critical situation within the following days anymore. The planned receipts are shown in light grey on top of the dark grey bar. As soon as the goods are received by your customer and the stock level is updated the quantity will be added to Inventory level.

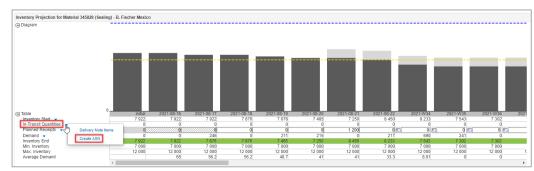


Figure: Inventory Projection with diagram, table and planned delivery

### 5.3 How to create an ASN out of VMI

Inform your customer about the shipment of your planned delivery with an ASN.

1. Move your mouse over the In-Transit Quantities area and



2. select create ASN.

Figure: Inventory Projection view with diagram and activated selection for creating an ASN



- 3. Define the time frame for the planned receipts to be considered for delivery
- 4. and click apply.

Table     Inventory Start     In-Transit Quantities	0		initial 7 922	2021-08-16 7 922	2021
Planned Receipts v	Question		_		7/////
Demand Inventory End Min. Inventory Max. Inventory Average Demand	Consider planned re	·	22/08 Cancel	)/21  📑	

Figure: Inventory Projection view with question box for considered planned receipts

The **Create ASN** screen is displayed. Continue to create an ASN as described in the 'Handout for the SupplyOn Service Logistics & Finance. Advance Shipping Notice (ASN)', which can be found on the <u>Supplier Info Portal</u>.

trg-B. Fischer AG (DEMO C	01101100			16/08/21	<b>B</b>		FPA No.:				FPA Statu	US:	New
mpany Name (Customer): trg-B. Fischer AG (DEMO COMPANY) Ship-1 Select ASN Positions Complete ASN				MX01 / BC	G1		Unloading	Point (Consignee): B. F	ischer Me	xico			
s Complete ASN													
✓ Manage View -													Reset all
Del. Note Pos. Material	No. (Customer)	ASN Creation Due Propose	ed De	elivery U	oM Warn	Pack	Pack.Mat	Packing Profile	Eng	Order No.	Order Pos.	Amount SP	Qty. per
010 345828		11/08/21 05:00	1200	1 200 E	A A		Details	<manual data="" entry=""></manual>		3627447	1	0	)
	Manage View     Del. Note Pos. Material	Manage View     Del. Note Pos. Material No. (Customer)	Manage View     Del. Note Pos. Material No. (Customer) ASN Creation Due Propose	Manage View     Del. Note Pos. Material No. (Customer) ASN Creation Due Proposed Dr.	Manage View     Del Note Pos. Material No. (Customer) ASN Creation Due Proposed Delivery U	Manage View     Del. Note Pos. Material No. (Customer) ASN Creation Due Proposed Delivery UoM Warm	Manage View     Malerial No (Customer) ASN Creation Due Proposed Delivery UoM Warm Pack	Manage View     Material No. (Customer) ASN Creation Due Proposed Delivery UoM Warn Pack Pack.Mat	V Manage View- Del. Note Pos. Material No. (Customer) ASN Creation Due Proposed Delivery UoM Warm Pack Pack.Mat Packing Profile	Manage View     Manage View     Del. Note Pos. Material No. (Customer) ASN Creation Due Proposed Delivery UoM Warm Pack.mat PackMat Packing Profile Eng	V Manage View- Del. Note Pos. Material No. (Customer) ASN Creation Due Proposed Delivery UoM Warm Pack Pack.Mat Packing Profile Eng Order No.	V Manage View Del. Note Pos. Material No. (Customer) ASN Creation Due Proposed Delivery UoM Warm Pack.m. Pack.Mat Packing Profile Eng Order No. Order Pos.	V Manage View Del. Note Pos. Material No. (Customer) ASN Creation Due Proposed Delivery UoM Warm Pack PackMat PackMat PackMat. Packing Profile Eng Order No. Order Pos. Amount SP

Figure: Create ASN with Select ASN Positions tab

As soon as you have sent the ASN, the **planned receipts** quantity will be reset to **0** and the line **In-Transit Quantities** will show for this example the quantity **1200**.

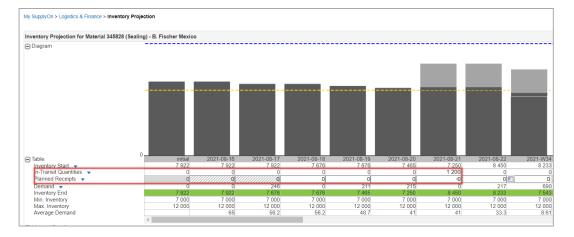


Figure: Inventory Projection view with new stock view with In-Transit Quantities number and stock



As soon as your customer has received the sent material, the **In-Transit Quantity** is reset to **0** and the **Inventory Start** will show a plus of **1200**.

### 5.4 How to view the demand details and history

The Inventory Projection screen offers additional details about the demands the customer sends. You can either open the details or the history.

1. Move your mouse over the **demand** area and select either **Demand history** or **Demand details** 

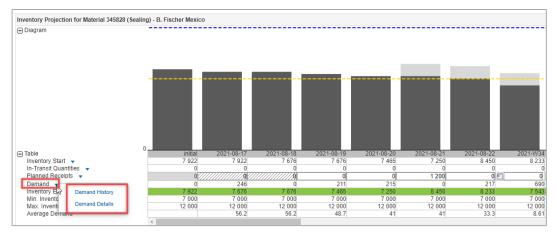


Figure: Inventory Projection view with diagram and activated selection for Demand

Within the **Demand History** you can see if and how a demand has changed within a certain time period. You define the time period of the messages and how many **time buckets** you want to see. A **time bucket** can be a day, a week or a month.

SupplyOn > Logistics & Fina	ance > Demand History										
Demand History for Materi	ial 345828 (Sealing ) - B. Fisc	her Italia - trg-SAPHI	IR S.A. (DEMO COMPANY)								
Timestamp of Transmissie Demand Date Display of Demand Time I	from 25.08.21	3 14 b	lays back puckets ahead <b>Search</b> ) monthly								
Document Type	Document No. Mes	ssage Timesta	Change Timestamp	2021-W34	2021-W35	2021-W36	2021-W37	2021-W38	2021-W39	2021-W40	
DeliveryInst gross	00003	07.09.21 11:03	07.09.21 11:05			2 772	3 207	830			
DeliveryInst gross	00003	25.08.21 15:56	25.08.21 15:57	2 349	3 477	1 406					

Figure: Demand History with details of demand messages

2. Click **Back** to return to the **Inventory Projection** screen.

Within the **Demand Details** you see the demands displayed in the layout of a delivery instruction. Here you can either Download or Print the demands if needed. From here you can also view the Demand history.

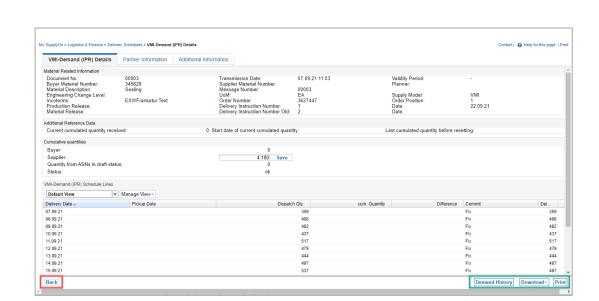


Figure: VMI-Demand (IPR) Details with the Demand History, Download and Print buttons

3. Click **Back** to return to the **Inventory Projection** screen.

SUPPLYÓN



## 6 Material master data I can define by myself

You can update relevant material master data. For that you need the role as described here.

- 1. Open the Logistics & Finance Dashboard
- 2. Scroll down to the tile Settings and Master Data
- 3. Open the Material Master Data

		SupplyOn > Logistics & Finan	:e > Dashbo	bard				C Last Refresh 3 Mins Ago 🍂
ogistics & Finance	_	Confirmable Orders	÷	Alerts	÷	elnvoicing	÷	Settings and Master Data
Dashboard		43		619		281		Down- and Upload Settings
Demand	~	Total Confirmable Orders		Total New Alerts		Total Billable Items		→ Format → Download Profiles
Planning	~	Order Status		Туре		Billable Item Status		Master Data
Delivery	~	Dated	2	Inventory Alerts	35	Billable Items Due	279	→ Material Master Data → Org. Master Data
Monitoring	~	Partly Confirmed	3	FPA/ASN Alerts	167			→ Performance Data Packing Process Master Data
		Open	38	Material Status Alerts	62			Aterial Weights and Measures
Help & Support		Confirm Orders		Demand Alerts	355			→ Packing Material → Packing Instruction

Figure: Logistics & Finance Dashboard with the tile Settings and Master Data

You are in the Material Master Data screen. Here you can define master data either one by one or use the **Download Material xIs** and **Upload xIs** functions.

		Search	Reset													My Sea	arch Profiles	¥	nde Sear	ch Area
	iterial Master		Manage View -																Reset	all Filters
-	Aaterial 🔺	Material Desc.	Plant Buver	Min.	Sional	Max.	Rnd, Del, Qtv.	Min. Del. Qtv.	Transp. T	Planner	DoS	Mee	S	M Av	Pro	cess Custo	oms Commodity	Lan	Bat	Forwa
	27376	material Dese.	B. Fischer Italia	10 000	0 girdi	20 000	1010. Del. Gig.	min. Dot. aty.		SO PLA	×	2	0	7	28 IPR		Covering		D.01	CARA
	45828	Sealing	B. Fischer Mexico	0	0	20000	1			SO PLA		0	0	0	28 NO		O-Ring Se			0090
	45828	O-Ring zur Abdi	B. Fischer DE	0	0	0	1			Markus M.		0	0	0	28 NO		O-Ring zur			0030
	45828	O-Ring Sealing (	B. Fischer Italia	1 100	0	4 600	1	1		SO PLA		8	0	13	28 IPR		O-Ring Se			0090
	552345	Cover yellow 13	B. Fischer Italia	0	0	0	1	1				0	0	0	28 NO	NVMI				0090
	47490	Thermoplastisch	B. Fischer DE	0	0	0	1	1	48	Markus M.,		0	0	0	28 NO	NVMI	Thermopla			
	47490	Protection cap	B. Fischer Italia	500	0	3 000	1	1	48	SO_PLA		0	0	0	28 IPR					0090
	90128	Zylindergehäuse	B. Fischer DE	0	0	0	1	1	48	Markus M		0	0	0	28 NO	NVMI	Zylinderge			
	90128	Cylindrical Casing	B. Fischer Mexico	0	0	0	1	1	48	Markus M		0	0	0	28 NO	NVMI	Cylindrical			
	90128	Casing	B. Fischer Italia	1 000	0	2 000	1	1	72	SO_PLA		0	0	0	28 IPR		Cylindrical	DE		
3	93745	Sleeve to conne	B. Fischer Mexico	0	0	0	1	1	48	Markus M		0	0	0	28 NO	NVMI	Sleeve to c			0090
1	93745	Kabelbaum zur	B. Fischer DE	0	0	0	1	1	48	Markus M		0	0	0	28 NO	NVMI	Kabelbaum			
1	93745	Cable Sleeve	B. Fischer Italia	1 000	0	3 000	100	2 000	48	SO_PLA		0	0	0	28 IPR		Kabeltülle	DE	×	0090
3	99128	Cylindrical Casing	B. Fischer Italia	0	0	0	1	1	48			0	0	0	28 NO	NVMI				
	PG0062221	KT00830100B	B. Fischer Italia	1 000	0	5 000	1	1	48			0	0	0	28 DE	INST				
	PG0062229	KT00830100B	B. Fischer Italia	1 000	0	3 000	1	1	48			10	0	15	28 DE	INST				
	PG0062241	KT00830100B	B. Fischer Italia	1 000	0	2 000	1	1				0	0	0	28 DEI					
	R.2349820121	220uF,10%,10V,		0	0	0	1	1	10			0	0	0	28 DE					Carri
	R.8888820121	6.8pF,0.5pF,50V	B. Fischer Italia	0	0	0		1		FRA-001		0	0	0	28 DE					Carri
	R.8888820124	6.8pF,0.5pF,50V	B. Fischer Italia	0	0	0		1		FRA-001		0	0	0	28 DE					Carri
	tug "B"	Zug "B"FTX	B. Fischer Italia	0	0	0	1	1	48			0	0	0	28 DE	.INST				

Figure: Material Master Data overview screen

The min and max amount quantities are defined in the customer ERP and cannot be changed by you. You can define:

 RND. Del. Qty. (rounding delivery quantity) – is considered when creating the planned delivery. For one material the rounding quantity is for example 100. The system will not accept 85 as a planned delivery.



- Min. Del. Qty. (Minimum delivery quantity) is considered when creating the planned delivery. For one material the batch size is for example 2000. The system will not accept a planned delivery of 1900 and will correct it up to 2000.
- Transp. Time (Transportation time) is considered when creating the planned delivery. In this example 48 hours is shown. The next planned delivery is possible in 2 days.

Doku View	× 1	Manage View <del>-</del>								
Material 🔺	Material Desc.	Plant Buyer	Min.	Signal	Max.	Rnd. Del. Qty.	Min. Del. Qty.	Transp. Time	Planner	DoS .
127376			10 000	0	20 000	1	1	48	1000	~
345828	Sealing		0	0	0	1	1	48		
345828	O-Ring zur Abdi		0	0	0	1	1	48		
345828	O-Ring Sealing (		1 100	0	4 600	1	1	48		
5552345	Cover yellow 13		0	0	0	1	1	48		
747490	Thermoplastisch		0	0	0	1	1	48		
747490	Protection cap		500	0	3 000	1	1	48	-	
890128	Zylindergehäuse		0	0	0	1	1	48		
890128	Cylindrical Casing		0	0	0	1	1	48		
890128	Casing		1 000	0	2 000	1	1	72	-	
993745	Sleeve to conne		0	0	0	1	1	48		
993745	Kabelbaum zur		0	0	0	1	1	48		
993745	Cable Sleeve		1 000	0	3 000	100	2 000	48		

Figure: Material master data overview screen of Rnd. Del. Qty., Min. Del. Qty and Transp. Time



### 7 How to create a process-based alert

SupplyOn supports you in complying with the logistics KPIs. As explained <u>here</u>, you can see your current to-dos in the dashboard in the different order tiles. Additionally, you can set up an individual email alert for specific situations. This ensures that critical situations are no longer overlooked and logistics KPIs can be met.

- 1. Open the Dashboard
- 2. Click Alerts
- 3. Select Inventory Alerts

		SupplyOn > Logis	tics & Finance > Dashboar	rd					C Last Refresh	4 Mins Ago Alerts
Logistics & Finance		Forwarder Pic	kup Advice $\rightarrow$	Advance Sh	ipping Notice $ ightarrow$	VMI	(IPR)	-	> Kanban	P2P ALERTS Inventory Alerts
	_	0	1	?	2	12	2	9		FPA/ASN Alerts
Dashboard		FPA Creation Due	Pending FPA	ASN Creation Due	Pending ASN		ted Stock: lory Alerts	Actual Stock: Inventory Alerts		Demand Alerts
Demand	~	Due Deliveries		135		Mate		on at the end of		All Alerts
Planning	~	Overdue		FPA Sent for ASN Management)	(Transport	Below	Zero		7	
Delivery	~	Due Today		Due Deliverie	5					
Monitoring	~			Overdue		Below	Min Limit		3 Delivery Statu	s
Invoicing	~	Due Next 7 Days		Due Teder		Above	Max Limit		1 Open Partially Delive	1 rred 0
Interactive Tour		Create FPA		Create A SN	<b>~</b>				Kanban Card	Printed 11

Figure: Dashboard / Alerts

Define a search profile you are interested in. For further details how to create a search profile open the <u>media library</u> and search for the tutorial **VMI monitoring**.

- 4. Build your search profile by clicking Add a line.
- 5. Select the Search criteria, for this example select Status Stock Projection.
- 6. Leave equal to and select the entries below minimum, below zero and above maximum.
- 7. Determine by when you want to be informed about this situation by selecting **occurrence**, days in the future and **90**.
- 8. Test your search parameters by clicking **Search**.

			<i>r</i>		1		My Search	D	н	de Search Area
Inactive date	✓ equal to	o (selection of date 👻		B	Delete line		Default V		V N	lanage View -
Status Stock Projected	Stock Projected v equal to		Below Min.	*				E-mail Notification		
Status Stock Projected	👻 equal to	• •	Below Zero	*	Delete line					
Status Stock Projected	Projected v equal to v Above Max.		~	Delete line						
Occurrence	✓ days in	the future (incl. pa 🗸	90		Add line   Delete line					
Search Reset										
Inventory Alerts (40)	FPA/ASN Alerts (165	5) Material St	atus (128)	Demand Alerts (345)						
Default View	✓ Manage View	•								Reset all Filte
Ign. B. Ign. S Material	Ma	aterial Desc.	Pla	int Buyer	Status	Stock projected	Stock on Hand	Process Name	Planner	ASN (last L
1134809	GL	LSDFUE TO39 REL I	D9,13 B.	Fischer Italia	Actual stock: Above Max.	9 507	9 507	SCM	Melani	23/08/21 0
1134809	GL	LSDFUE TO39 REL I	D9,13 B.	Fischer Italia	Stock projected: Below Zero	-22 758	9 507	SCM	Melani	23/08/21 0
1134809	GL	LSDFUE TO39 REL I	D9,13 B.	Fischer Italia	Stock projected "today": Below Zero	-22 758	9 507	SCM	Melani	23/08/21 03
123442-	FD	DB201 Transistor	В.	Fischer DE	Actual stock: Above Max.	9 200	9 200	SCM		23/08/21 02
127376			В.	Fischer Italia	Stock projected "today": Below Min.	651	2 625	SCM	SO_PL	23/08/21 0
127376			В.	Fischer Italia	Stock projected: Below Min.	429	2 625			23/08/21 0
127376			В.	Fischer Italia	Stock projected: Below Zero	-6	2 625	SCM	SO_PL	12/08/21 1
127376			В.	Fischer Italia	Actual stock: Above Max.	2 625	2 625	SCM	SO_PL	23/08/21 0
2025338	NS	S E02C 0,15 %C 6,3	5 mm B.	Fischer Italia	Actual stock: Above Max.	2 628	2 628	SCM	SVS	23/08/21 0
2025338	NS	S E02C 0,15 %C 6,3	5 mm B.	Fischer Italia	Stock projected "today": Below Zero	-659	2 628	SCM	SVS	23/08/21 03
2025338		S E02C 0,15 %C 6,3		Fischer Italia	Stock projected: Below Zero	-659			SVS	23/08/21 0
345828		ealing		Fischer Italia	Actual stock: Above Max.	7 922				23/08/21 02
345828		ealing		Fischer Italia	Stock projected "today": Above Max.	10 022				23/08/21 02
345828		ealing		Fischer Mexico	Actual stock: Below Signal	7 922				23/08/21 00
		ealing		Fischer Mexico	Stock projected "today": Below Signal	7 922				23/08/21 00
345828	Se	ealing		Fischer Mexico	Stock projected "today": Below Zero	-244 536			AME	28/04/14 11
345828 456828 456828		ealing		Fischer Mexico	Stock projected: Below Zero	-244 536	3 264		AME	28/04/14 11

Figure: Alert Overview / Define Search Profile



You can save these search parameters as search profile and define the frequency of e-mail notifications for it. Define a name for your search parameters and save it.

- 9. Define a name for your Search Profile.
- 10. Click on the Drop Down next to Manage View
- 11. and click Create new

	Inactive date		aqual to (	selection of date				a Delete line		My Search	h Profiles		ide Search Area
	Status Stock Projected					Palau Mia	- Aug			critical in	90 days	~ N	lanage View-
			1.			E-mail Not	ification	C.	Create new				
								Update					
	Status Stock Projected		equal to			Above Max.	`	Add line   Delete line					
	Occurrence	*	days in the	e future (incl. pa	•	90		Add the   Delete the					lete
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1		Manag	e View •			Direct During		Older		Otenti en Une d	Decession Marrie	Disease	Reset all Filte
	Ign. B. Ign. S Material 🔺			rial Desc.		Plant Buyer		Status	Stock projected	Stock on Hand	Process Name	Planner	ASN (last U
1			GLS	DFUE TO39 R	IEL D	9,13 B. Fischer Italia B. Fischer Italia		Stock projected: Below Zero Stock projected: Below Zero	-22 758	9 507	SCM SCM	Melani	23/08/21 03
1	127376												12/08/21 13
													22/02/24 02
1	127376		MP F	020 0 15 8 0	6.26	B. Fischer Italia		Stock projected: Below Min.	429	2 625	SCM	SO_PL	
	127376 2025338			02C 0,15 %C	6,35	B. Fischer Italia mm B. Fischer Italia		Stock projected: Below Min. Stock projected: Below Zero	429 -659	2 625 2 628	SCM SCM	SO_PL SVS	23/08/21 03
	127376 2025338 456828		Seal	ing	6,35	B. Fischer Italia mm B. Fischer Italia B. Fischer Mexico		Stock projected: Below Min. Stock projected: Below Zero Stock projected: Below Zero	429 -659 -244 536	2 625 2 628 3 264	SCM SCM SCM	SO_PL	23/08/21 03
	127376 2025338 456828 456983		Seal Seal	ing	6,35	B. Fischer Italia mm B. Fischer Italia		Stock projected: Below Min. Stock projected: Below Zero	429 -659	2 625 2 628 3 264 0	SCM SCM	SO_PL SVS AME	23/08/21 03 28/04/14 11
	127376 2025338 456828 456983 747490		Seal Seal	ing ing ection cap	6,35	B. Fischer Italia mm B. Fischer Italia B. Fischer Mexico B. Fischer Mexico		Stock projected: Below Min. Stock projected: Below Zero Stock projected: Below Zero Stock projected: Below Zero	429 -659 -244 536 -271 900	2 625 2 628 3 264 0 2 242	SCM SCM SCM SCM	SO_PL SVS AME SO_PL	23/08/21 03 28/04/14 11 23/08/21 02
	127376 2025338 456828 456983 747490 890128		Seal Seal Prote Casi	ing ing ection cap	6,35	B. Fischer Italia mm B. Fischer Italia B. Fischer Mexico B. Fischer Mexico B. Fischer Italia		Stock projected: Below Min. Stock projected: Below Zero Stock projected: Below Zero Stock projected: Below Zero Stock projected: Below Zero	429 -659 -244 536 -271 900 -282	2 625 2 628 3 264 0 2 242 2 570	SCM SCM SCM SCM SCM	SO_PL SVS AME SO_PL SO_PL	23/08/21 03 28/04/14 11 23/08/21 02 23/08/21 02
	127376 2025338 456828 456983 747490 890128 993745 993745		Seal Seal Prote Casi Cabl	ing ing ection cap ng		B. Fischer Italia mm B. Fischer Italia B. Fischer Mexico B. Fischer Mexico B. Fischer Italia B. Fischer Italia		Stock projected: Below Min. Stock projected: Below Zero Stock projected: Below Zero Stock projected: Below Zero Stock projected: Below Zero Stock projected: Above Max.	429 -659 -244 536 -271 900 -282 4 470	2 625 2 628 3 264 0 2 242 2 570 3 473	SCM SCM SCM SCM SCM SCM	SO_PL SVS AME SO_PL SO_PL	23/08/21 03 28/04/14 11 23/08/21 02 23/08/21 02
	127376 2025338 456928 456983 747490 899128 9993745 995555 ASA-000024		Seal Seal Prote Casi Cabl Zwei Mate	ing ection cap ng e Sleeve ig zum Koppelr rial24		B. Fischer Itala M. Fischer Itala B. Fischer Mexico B. Fischer Mexico B. Fischer Itala B. Fischer Itala B. Fischer Itala B. Fischer Itala B. Fischer Itala		Stock projected Below Mm. Stock projected Below Zero Stock projected Below Zero Stock projected Below Zero Stock projected Below Zero Stock projected Below Mm. Stock projected Below Mm. Stock projected Below Zero	429 -659 -244 536 -271 900 - 282 4 470 -956 -0 0 -2 639	2 625 2 628 3 264 0 2 242 2 570 3 473 0 661	SCM SCM SCM SCM SCM SCM SCM SCM	SO_PL SVS AME SO_PL SO_PL SO_PL SO_PL	23/08/21 03 28/04/14 11 23/08/21 02 23/08/21 02 23/08/21 02
	127376 205338 456828 456983 747490 890128 993745 993555 AS-00024 AS-000024		Seal Seal Prote Casi Cabl Zwei Mate	ing ection cap ng e Sleeve ig zum Koppelr		B. Fischer Itala B. Fischer Itala B. Fischer Mexico B. Fischer Mexico B. Fischer Itala B. Fischer Itala B. Fischer Itala B. Fischer Itala B. Fischer Itala B. Fischer Itala		Stock projected: Below Min. Stock projected: Below Zero Stock projected: Below Zero Stock projected: Below Zero Stock projected: Below Zero Stock projected: Below Min. Stock projected: Below Min. Stock projected: Below Zero Stock projected: Below Zero	429 - 659 - 244 538 - 271 900 - 282 - 4 470 - 956 - 0 - 2 639 - 2 639	2 625 2 628 3 264 0 2 242 2 570 3 473 0 661 671	SCM SCM SCM SCM SCM SCM SCM SCM SCM SCM	SO_PL SVS AME SO_PL SO_PL SO_PL	
	127376 2025338 456928 456928 747490 890128 993745 99555 ASA-00024 ASA-00024 NUK-00003		Seal Seal Prote Casi Cabl Zwei Mate Mate	ing ection cap ng e Sleeve ig zum Koppelr rial24		B. Fischer Itala M. Fischer Itala B. Fischer Mexico B. Fischer Mexico B. Fischer Itala B. Fischer Itala B. Fischer Itala B. Fischer Itala B. Fischer Itala		Stock projected Below Mm. Stock projected Below Zero Stock projected Below Zero Stock projected Below Zero Stock projected Below Zero Stock projected Below Mm. Stock projected Below Mm. Stock projected Below Zero	429 -659 -244 536 -271 900 - 282 4 470 -956 -0 0 -2 639	2 625 2 628 3 264 0 2 242 2 570 3 473 0 661 671 1 000	SCM SCM SCM SCM SCM SCM SCM SCM	SO_PL SVS AME SO_PL SO_PL SO_PL SO_PL	23/08/21 03 28/04/14 11 23/08/21 02 23/08/21 02 23/08/21 02

Figure: Alert Overview / Define and save Search Profile

#### 12. Click E-mail Notification

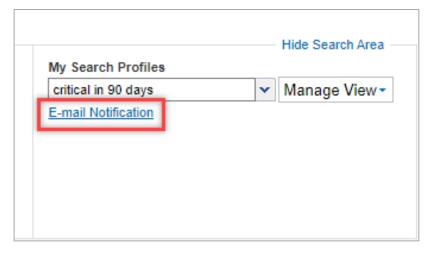


Figure: Alert Overview / Define E-mail Notification for Search Profile



- 13. The just created search profile is automatically selected.
- 14. Set the tick next to **Active**.
- 15. Define the notification period, for example on a daily basis at 8:15 am in the morning.
- 16. Click Save

E-mail Notification	
Based on Search Profile critical in 90 days	<b>v</b>
Active	
Alert Notification Type	
as Attachment	as Pure Text
Frequency	
Periodic (according to your timezone: (GM	/IT+01:00) Europe/Berlin)
🗹 Monday 🗹 Tuesday 🗹 Wednesda	y 🗹 Thursday 🗹 Friday 🗌 Saturday 🗌 Sunday
Daily at 08 : 15	
O Hourly from 8:00 ✓ to 17:00	v every 4 v hour(s)

Figure: Alert Overview / E-mail Notification

In this example you will receive an e-mail notification as soon as the critical situation occurs.



# 8 Roles and Rights

#### Note

On the following help page it is described how you as a CompanyAdmin of your company can create users with the corresponding roles for your colleagues: <u>https://service.supplyon.com/topcases/?lang=de&articleld=2062</u>

Basic information about your user account, its roles and rights are visible under Administration – My User Account.

Services 🔻	Administration <b>v</b>	News
	My User Account	
	My Substitutes	
	Customer Responsible	

Figure: Administration > My User Account

As soon as you click here, you will see basic information like your username, email address etc.

Contact data	
User ID*:	SiemensTest_User_TTA1
First name*:	Healthineers
Last name*:	Siemens
Salutation*:	Not selected
E-mail*:	on.com
Phone*:	0
Language*:	English
Two-factor authentication:	Enabling for user
Change Password	

Figure: My master data



To be able to commit the actions of this guide, the following roles in the tab "My roles" are required:

My master data	My roles	My service settings	My substitutes	Privacy settings				
Expand the groups for a	a more precise ro	les assignment.					Expand all   Coll	apse all
					Request	Discard changes		
AirSupply related r	roles (not assigne	ed)					Expand	Ŧ
Company Adminis	tration (assigned	1)					Expand	Ŧ
Contract and Invoi	ce (not assigned)	)					Expand	Ŧ
Management Cock	pit (not assigned	)					Expand	Ŧ
Sourcing and Engi	ineering (not assi	igned)					Expand	Ŧ
Supply Chain Colla	aboration (partial	lly assigned)					Expand	Ŧ

Figure: My roles

#### Group: Supply Chain Collaboration

VMISellerAdmin:

 $\checkmark$  Display of VMI articles, display and changing of supplier master data

WebEDISellerAdmin:

 $\checkmark$  Access to Supply Chain Collaboration.

The SupplyOn Company Admin is authorized to create new users or to assign roles to already existing users.



Depending on whether you were already an existing supplier on SupplyOn or are completely new, the role assignment differs:

For newer suppliers you should see this screen here:

#### Shipping, Goods Receipt, Warehouse...

Area	as of responsibility		
	Name 个	Description	More information
	Company Administration	Company master data, users and permis	More information
	Order Fulfillment, Finance Processes	Supply Chain Management.	More information
	Quality Management	Supplier Quality Management (QM).	More information
	Sales	Sourcing to Contract, Progress to Order	More information
	Shipping, Goods Receipts, Warehouse	Shipping, goods receipts, warehouse ma	More information
	Supply Chain Administration	Demand, logistics and finance processes.	More information

Figure: User Management with Edit User and Areas of responsibility

After clicking **More information**, the following help page is displayed. Here you can see the tasks the user can fulfill with this responsibility.

Shipping, goods receipts, warehouse management
Supply Chain Collaboration
<ul> <li>Displaying demand and logistics data</li> </ul>
<ul> <li>Creating FPAs and ASNs</li> </ul>
<ul> <li>Editing planned receipts</li> <li>Editing stock movements</li> </ul>
<ul> <li>Creating goods receipts</li> </ul>
— Managing master data

Figure: Help page with explanation for Shipping, goods receipt and warehouse management responsibility